

11:30
– 12:00 PM

OPTIONAL **Open Networking**

Not registered yet? [Register here](#) →

12:00
– 12:05 PM

STAGE · WELCOME

Welcome from the Host



12:05
– 12:50 PM

OPENING PANEL

The SaaS-pocalypse vs. \$175 Million: Why Are Investors Still Betting on Family Office Tech?

AI is shaking up family-office software. Investors behind K1x, Arch and Luminary weigh in: what's at risk, what's built to last, and which tech should offices partner with?



12:55
– 1:40 PM

CASE STUDY

Closing the Books Weeks Faster | How Temerity Capital Uses SumIt Day-to-Day & at Quarter-Close

SumIt Use Case | General Ledger Accounting



CASE STUDY

7 Generations, 1 Platform | How Trusted Family Became the Hoffberger Family's Ops Hub

Trusted Family Case Study | Family Governance



1:45
– 2:10 PM

DEMO

Asset Vantage | Integrated Accounting & Reporting

Connecting aggregation, general ledger accounting, performance insights, documents and MCP-enabled AI workflows.



DEMO

Eleven Systems | Operations & Consolidated Reporting

Reduce admin overhead by bringing property, family, and financial details into one secure place.



2:15
– 2:40 PM

DEMO

Auria | Unified Platform for Complex Family Wealth

Connect ownership structures, entities, investments, alternative assets, documents, and reporting to reduce tech stack fragmentation.



DEMO

Asseta | Accounting & Multi-Entity Mgmt

The Intelligent Family Office Suite® - AI-native operating system bringing GL, partnership accounting, banking, bill pay & reporting in one place.



2:45
– 3:10 PM

DEMO

Mantle Portal | Alts Tech, The OS for Wealth

The private markets tech stack is melting into one platform. Mantle Portal unifies family office data to surface better returns and set your office up for the next gen.



DEMO

Aleta | Portfolio Management & Reporting

Consolidate family office holdings into one reporting view, using AI for document processing and an open MCP layer so AI agents can run new workflows on that data.



3:15
– 4:00 PM

CLOSING PANEL

How Family Offices Are Putting AI to Work & Managing Cyber Risk

From general LLMs to private deployments and custom-built tools, where are family offices using AI—and what should they build or buy next? We then explore how AI is changing risk—and the role of governance and controls in keeping pace with it.



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Welcome from the Host



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OPENING PANEL

AI in the Office: From Custom Code to MCP & Agents

Real implementations from the middle and back office — custom-built systems, MCP-connected tools, and the strategies behind deploying AI, securing it, and future-proofing the setup.



12:55

– 1:20 PM

DEMO

Masttro | Skip the Spreadsheet. Ask the Data.

See how to go from manual updates in static documents to interactive reports, built in seconds and ready to share with your principal.



DEMO

K1x | Tax Data Automation

K1Aggregator uses patented AI to extract K-1 data into Excel-ready reports, while its direct APIs with CCH Axcess and GoSystem simplify tax prep.



1:25

– 1:45 PM

DEMO

Sage Intacct | Accounting

Practical approaches to GL design, dimensional accounting, and allocations for family offices managing multiple entities and trusts.



DEMO

Unlimited ai | Consolidated Reporting & Automation

How a unified, AI-native platform purpose-built for family offices consolidates reporting and automates documents to cut through portfolio complexity.



1:50

– 2:10 PM

DEMO

AgilLink | Accounting & Bill Pay

Cloud-based platform connects bill pay, general ledger accounting, consolidated reporting, and investment data into one system.



DEMO

Archway | Integrated Accounting & Reporting

The new AP Module — SmartAP Capture automates invoice intake and entry, and a dynamic workflow engine handles approval rules and payment controls.



2:15

– 2:55 PM

SESSION

Beyond K-1 Automation: What's Next for Private Investment Tax Technology?

Following K1x's \$175M investment, its CEO, lead investor, and a family office practitioner on how AI is pushing tax tech from data extraction into a true intelligence layer.



SESSION

Owning Your Data & Your Intelligence

A practical discussion and live demo on building your own AI harness and data layer, connecting local and cloud models to your key applications so you own your intelligence.



3:00

– 4:00 PM

CLOSING PANEL

Takeaways & Trends to Watch in 2027

A closing discussion on key takeaways from the event and what family offices should have on their radar going forward, involving members of the steering committee and the broader community.

